*i*TPM

23.1.1 Update

Winter 2023 Update Release Notes

*i*TPM
Extend NetSuite for
Trade Promotion
Management

ANALYSIS · BUDGETING · DEAL PLANNING · SETTLEMENTS

Built for
ORACLE
NETSUITE

Native SuiteApp

BFN Certified

February 2023
Revised March 15, 2023

New Features in *i*TPM 23.1.1

Deduction Management Management Enhancements

1. S-03799: **Support for multi-currency without custom support scripts**
2. S-03804: **Append the deduction's Other Reference code to the Statement Charge's memo** in the debit line and description
3. S-03607: Add "***Estimated Spend***" **as another row in the Settlement form**.
4. S-03811: **New *Voiding Settlement?* and *Settlement Adjustment?* checkboxes** in the settlement for reporting:

Promotion Planning

5. S-03598: **Update Lump sum using the UPDATE ESTIMATE button** for approved promotions.
6. S-03675: New **Banner: Promotion is in the KPI refresh queue.**
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8. S-03813: New **LIST VIEW of promotions with KPIs** similar to the Promotion Comparison Report. **iTPM -> Promotions -> List**.

Annual planning

9. S-03350: New "***Remove item from promotion?***" **checkbox** to remove the item from the draft promotion.
10. S-03701: **Calculate Plan Spend in real time when the plan is saved.**
11. S-03769: Add **iTPM -> Help -> Annual Planning User Guides** to the *i*TPM center tab menu.
12. S-03838: S-03814 Populate REVENUE in the **Monthly Base Forecast for data entry method = "*Calculate REVENUE*"**
13. S-03832: Populate UNITS in the **Monthly Base Forecast for data entry method = "*Calculate UNITS*"**
14. S-03274: **Calculate an estimated base volume** if there is an overlapping base forecast record for the item or item group, use it to.
15. S-03886: New **data entry method for the monthly base forecast,** *"Spread Revenue, calculate Units"*
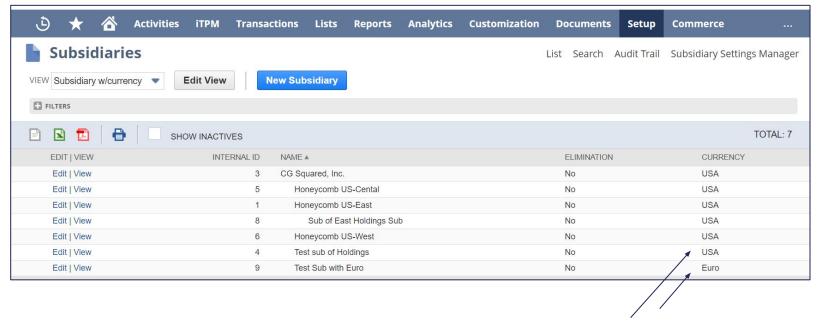16. S-03934   New button on the Event Plan, "*Process Event Plans Now*"

Applying Off -invoice

17. S-03717: New button on the sales order: "***Apply or ReApply Discounts***" to check the "*Apply iTPM Discounts*" checkbox.
18. S-03721 New button on the sales order: "***Apply OI Now***" so you don't have to wait for the script to run..
19. S-03743: New allowance list view: **iTPM -> Promotions -> Allowances by item**

Note: Go to Technical Release notes for 23.1.1 at www.i-TPM.com/admin-training-resources to see a list of the 100+ changes to *i*TPM in 23.1.1
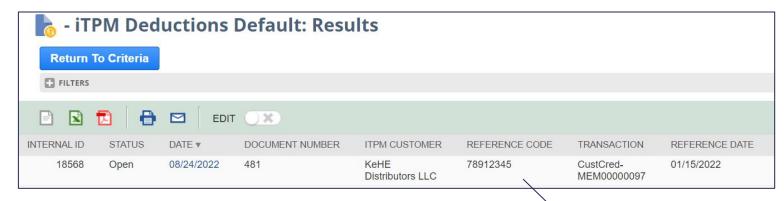
1. Support for multi-currency without custom support scripts

Benefits: No custom scripts are required after you update ¿TPM to 23.1.1
¿TPM will manage each subsidiary in the currency of that subsidiary.

Subsidiaries with different currencies

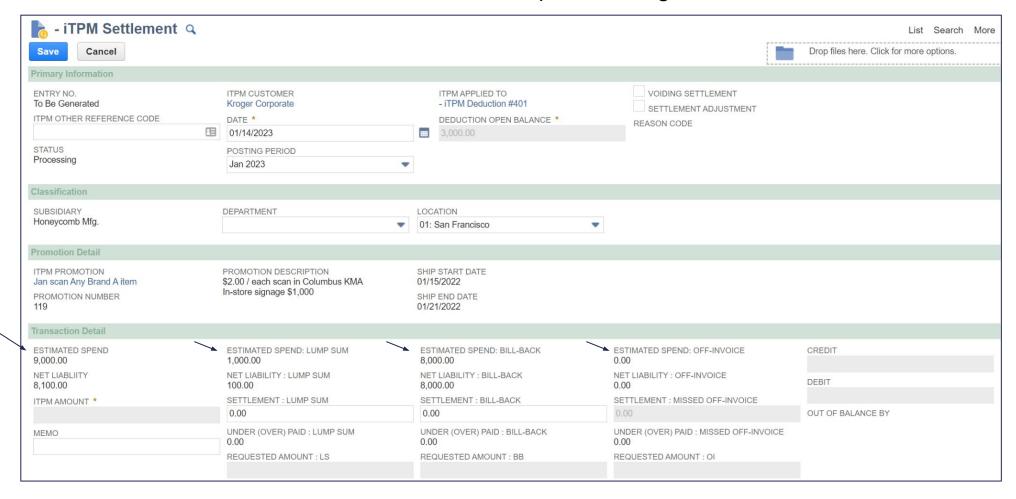# 2. Other Reference code is auto-appended to the Statement Charge's description

- iTPM Deductions Default: Results

Return To Criteria

FILTERS

EDIT

INTERNAL ID	STATUS	DATE ▼	DOCUMENT NUMBER	ITPM CUSTOMER	REFERENCE CODE	TRANSACTION	REFERENCE DATE
18568	Open	08/24/2022	481	KeHE Distributors LLC	78912345	CustCred-MEM00000097	01/15/2022

Benefits: The customer will see their own reference # in the statement charge description.

Statement Charge

STM00000018 KeHE Distributors LLC   OPEN

Edit   **Back** | **Actions ▼**

← → List Search More

TRANSACTION NUMBER
STM00000018

A/R ACCOUNT
1100 Accounts Receivable

CUSTOMER
KeHE Distributors LLC

CURRENCY
USA

EXCHANGE RATE
1.00

DATE
01/14/2023

POSTING PERIOD
Jan 2023

REF NO.
STM00000018

DUE DATE
01/14/2023

ITEM
Statement charge item

QUANTITY
1

DESCRIPTION
Statement Charge for - iTPM Deduction #481: 78912345

RATE
500.00

TOTAL
500.00

DEPARTMENT

SUBSIDIARY
Honeycomb Mfg.

LOCATION
02: Boston

CLASS

ITPM APPLIED TO
- iTPM Deduction #481

ACCOUNT	AMOUNT (DEBIT)	AMOUNT (CREDIT)	POSTING	MEMO	NAME	SUBSIDIARY	DEPARTMENT	CLASS	LOCATION
1100 Accounts Receivable	$500.00		Yes	Statement Charge for - iTPM Deduction #481: 78912345	KeHE Distributors LLC	Honeycomb Holdings Inc. : Honeycomb Mfg.			02: Boston
6023 Trade Promotion : Open Deduction		$500.00	Yes		KeHE Distributors LLC	Honeycomb Holdings Inc. : Honeycomb Mfg.			02: Boston

3. "*Estimated Spend*" is a row in the Settlement form

Benefits: Save time and mouse clicks with the Estimated Spend KPI right in the settlement form.

4. New *Voiding Settlement* and *Settlement Adjustment* checkboxes

Benefits: Use these checkboxes to filter and identify *Voiding Settlements* and *Settlement Adjustments* for settlements created after updating to *i*TPM 23.1.1.

These are auto-populated when creating new settlements.

Option: Use a CSV upload to populate these checkboxes in settlements created before updating to *i*TPM 23.1.1.

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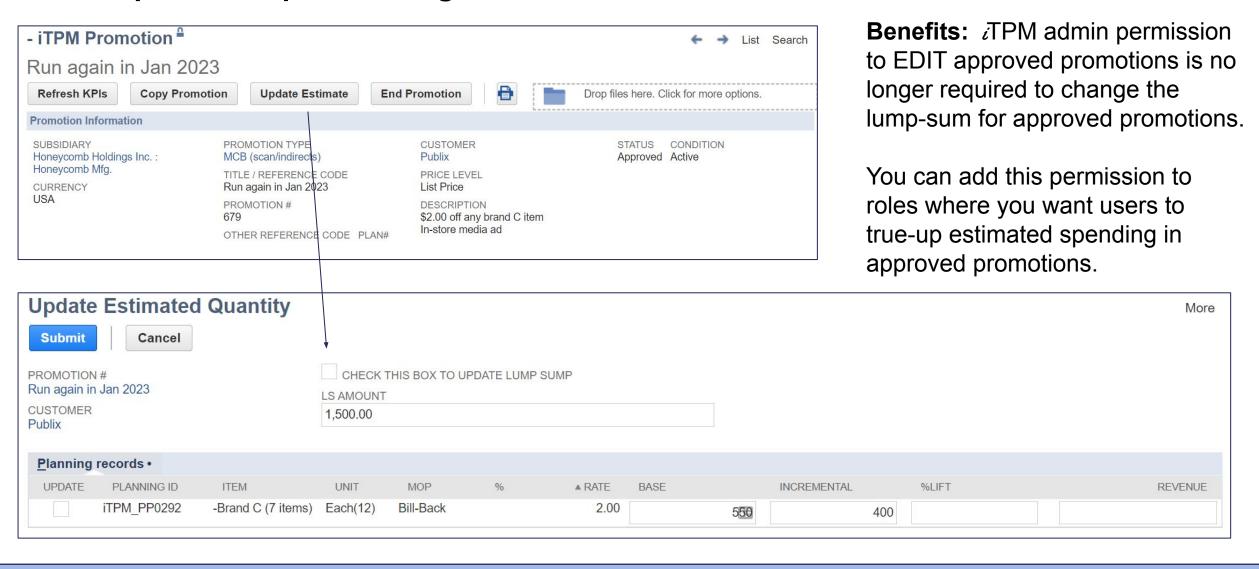16. S-03934 New button on the Event Plan, "*Process Event Plans Now*"

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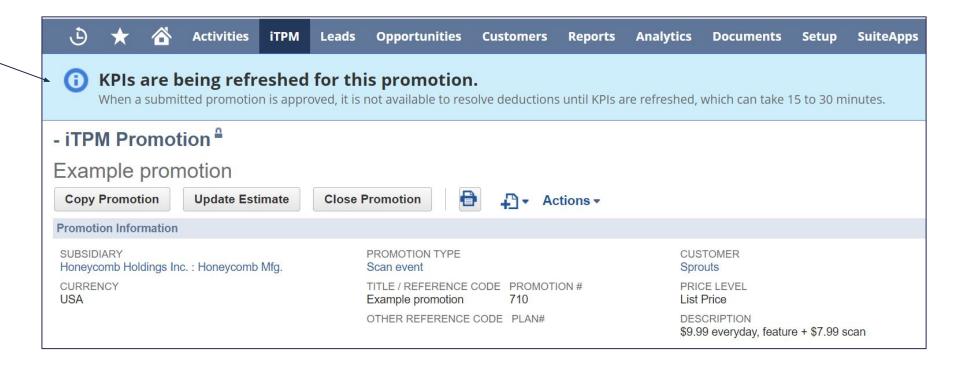
5. Update Lump sum using the UPDATE ESTIMATE button

Benefits: *i*TPM admin permission to EDIT approved promotions is no longer required to change the lump-sum for approved promotions.

You can add this permission to roles where you want users to true-up estimated spending in approved promotions.

6. New Banner: 'Promotion is in the KPI refresh queue'

Benefits: No need to look for a missing KPI Refresh button to know that KPIs are being refreshed. The banner reminds you that KPIs are being refreshed.
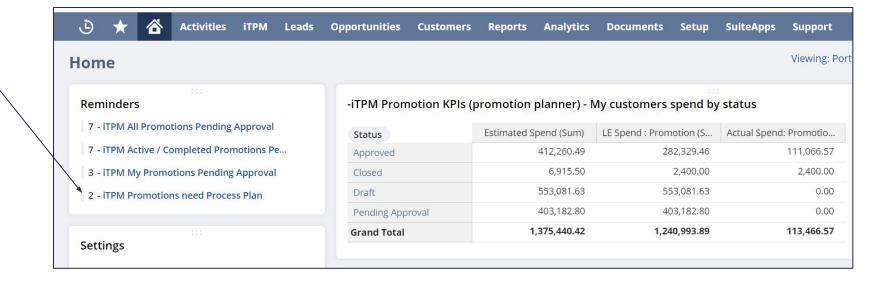
7. *Process Plan* automatically runs overnight

Benefits: No waiting if you forget to click *Process Plan* after you create or edit your promotion. The promotion will automatically be ready tomorrow to submit for approval.

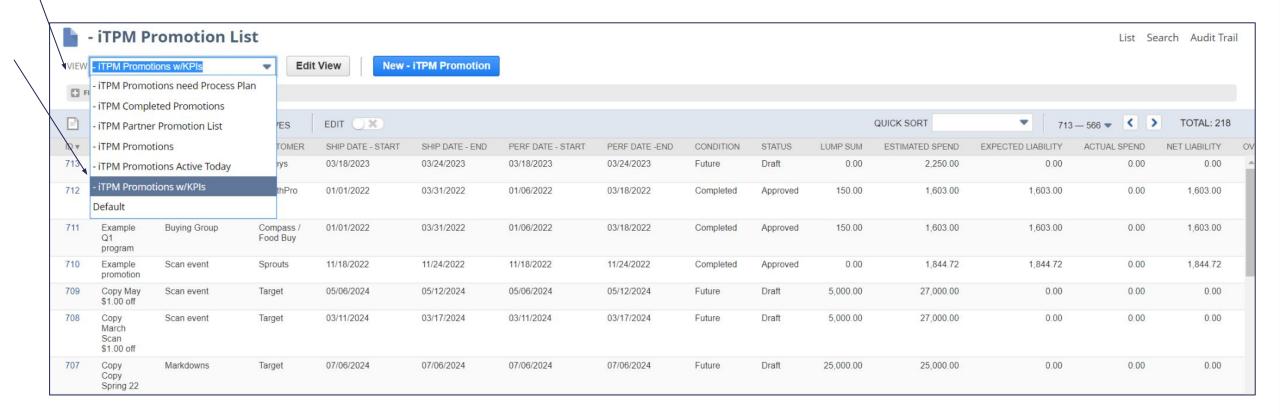You can use a reminder to see what promotions need *Process Plan*.

If a promotion is in the queue more than one day, look for *Process Plan* processing notes to see if an error needs to be corrected.

8. New **LIST VIEW of promotions with KPIs**

Benefits: Save mouse clicks having to go to the NetSuite global search to find this.
Now this is available directly from *iTPM -> Promotions -> List*

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Note: Go to Technical Release notes for 23.1.1 at www.i-TPM.com/admin-training-resources to see a list of the 100+ changes to ¿TPM in 23.1.1

9. New "*Remove item from promotion?*" checkbox (Also option to delete the promotion)

Benefits: Easily remove a planned item from your draft promotion with this checkbox.

The planning record in the promotion associated with your plan will be removed the next time the Plan to Promotion script runs.

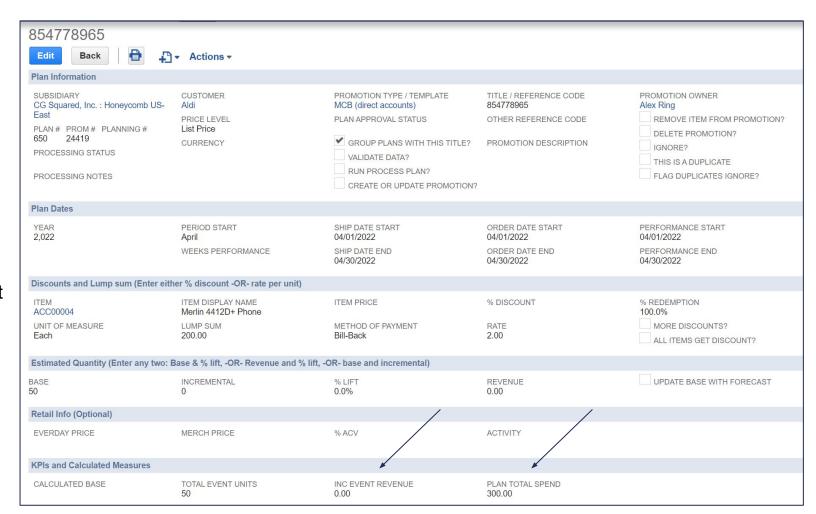# 10. Calculate Plan Total Spend in real time when the plan is saved.

Benefits: Real-time feedback on the cost of your planned event after you save or create your plan.

Plan Total Spend =
Lump Sum + Bill-back + off-invoice

Bill-back = Total Units times the allowance rate
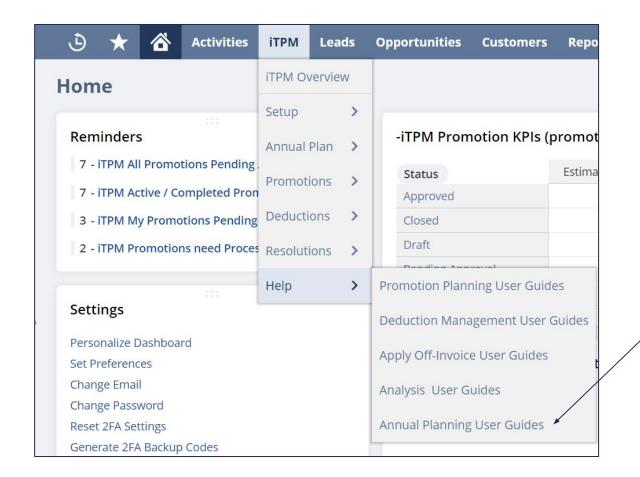.. or…
Bill-back = Total Revenue times the % discount

(Off-invoice calculation is similar to Bill-Back)

854778965

| Edit | Back | 🖨 | ➕▾ | Actions ▾ |

Plan Information

SUBSIDIARY	CUSTOMER	PROMOTION TYPE / TEMPLATE	TITLE / REFERENCE CODE	PROMOTION OWNER
CG Squared, Inc. : Honeycomb US-East	Aldi	MCB (direct accounts)	854778965	Alex Ring
	PRICE LEVEL	PLAN APPROVAL STATUS	OTHER REFERENCE CODE	☐ REMOVE ITEM FROM PROMOTION?
PLAN # PROM # PLANNING #	List Price			☐ DELETE PROMOTION?
650 24419	CURRENCY	✔ GROUP PLANS WITH THIS TITLE?	PROMOTION DESCRIPTION	☐ IGNORE?
PROCESSING STATUS		☐ VALIDATE DATA?		☐ THIS IS A DUPLICATE
		☐ RUN PROCESS PLAN?		☐ FLAG DUPLICATES IGNORE?
PROCESSING NOTES		☐ CREATE OR UPDATE PROMOTION?		

Plan Dates

YEAR	PERIOD START	SHIP DATE START	ORDER DATE START	PERFORMANCE START
2,022	April	04/01/2022	04/01/2022	04/01/2022
	WEEKS PERFORMANCE	SHIP DATE END	ORDER DATE END	PERFORMANCE END
		04/30/2022	04/30/2022	04/30/2022

Discounts and Lump sum (Enter either % discount -OR- rate per unit)

ITEM	ITEM DISPLAY NAME	ITEM PRICE	% DISCOUNT	% REDEMPTION
ACC00004	Merlin 4412D+ Phone			100.0%
UNIT OF MEASURE	LUMP SUM	METHOD OF PAYMENT	RATE	☐ MORE DISCOUNTS?
Each	200.00	Bill-Back	2.00	☐ ALL ITEMS GET DISCOUNT?

Estimated Quantity (Enter any two: Base & % lift, -OR- Revenue and % lift, -OR- base and incremental)

BASE	INCREMENTAL	% LIFT	REVENUE	☐ UPDATE BASE WITH FORECAST
50	0	0.0%	0.00	

Retail Info (Optional)

EVERDAY PRICE	MERCH PRICE	% ACV	ACTIVITY	

KPIs and Calculated Measures

CALCULATED BASE	TOTAL EVENT UNITS	INC EVENT REVENUE	PLAN TOTAL SPEND	
	50	0.00	300.00	

11. Add *iTPM -> Help -> Annual Planning User Guides*

Benefits: Faster access to online user guides and training videos for annual planning.

Less confusion for promotion planners that don't use annual planning features because planning resources are separate under *iTPM -> Help -> Promotion Planning User Guides*

12. Monthly Base Forecast for data entry method = *"Calculate REVENUE"*

Benefits: Less time on data entry. Enter **units**, let *i*TPM use price to calculate base revenue for you.

If you didn't enter a price for each month, *i*TPM uses the price you enter for the year.

If you didn't enter a price for the year, *i*TPM will use the item or item group's current price.

13. Monthly Base Forecast for data entry method = *"Calculate UNITS"*

Benefits: Less time on data entry. Enter revenue, let *i*TPM use price to calculate base units for you.

If you didn't enter a price for each month, *i*TPM uses the price you enter for the year.

If you didn't enter a price for the year, *i*TPM will use the item or item group's current price.
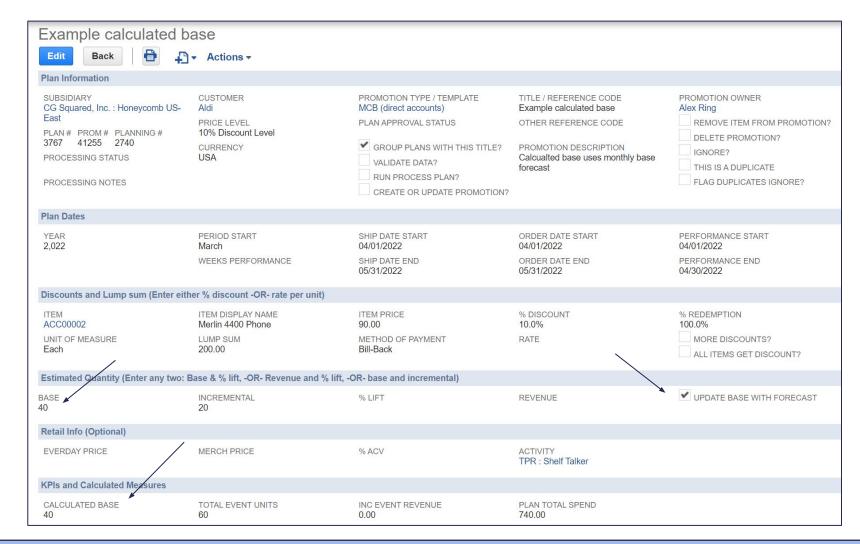
14. Calculate an estimated base volume

Benefits: Save time if you want to use your monthly forecasted base in event plans.

If there is a monthly base forecast for your customer, item or item group, and promotion dates, *i*TPM uses the plan's shipment dates to calculate a base that is proportional to the base in the overlapping months.

If the base is in a different unit-of-measure, *i*TPM converts the calculated base into the plan's unit-of-measure.

You have the option to use this calculated base in your Event plan.

15. New Monthly base forecast data entry method: *"Spread Revenue, calculate Units"*

Benefits: Less time on data entry. Enter annual revenue, let iTPM spread it across months and calculate units.

If you didn't enter a price for each month, ¿TPM uses the price you enter for the year.

If you didn't enter a price for the year, ¿TPM will use the item or item group's current price.

16. New button on the Event Plan: **"*Process Event Plan Now*"**

Benefits: Save time so you don't have to wait for the script to process your Event Plans.

If you don't want to wait for the Plan-to-Promotion script to run, you can click the "*Process Event Plans Now*" button.

If you don't see the button, then you know the script is currently running.

Note: If nothing happens, your role does not have the needed permissions to trigger the script.

- iTPM Plan

Example May bill-back

[Edit] [Back] [Process Event Plans Now] | 🖨 | 📄▾ | Actions ▾

Plan Information

SUBSIDIARY	CUSTOMER	PROMOTION TYPE / TEMPLATE	TITLE / REFERENCE CODE	PROMOTION OWNER
Honeycomb Holdings Inc. : Honeycomb Mfg.	Sobeys	MCBs	Example May bill-back	Alex Ring

EVENT PLAN #	PROMOTION #	PLANNING #	PRICE LEVEL	PLAN APPROVAL STATUS	OTHER REFERENCE CODE
307	579	290	5% Discount Level		81607

☐ REMOVE ITEM FROM PROMOTION?
☐ DELETE PROMOTION?

PROCESSING STATUS   CURRENCY   ☑ GROUP PLANS WITH THIS TITLE?   PROMOTION DESCRIPTION   ☐ IGNORE?
☑ VALIDATE DATA?   ☐ THIS IS A DUPLICATE
PROCESSING NOTES   ☐ RUN PROCESS PLAN?   ☐ FLAG DUPLICATES IGNORE?
☑ CREATE OR UPDATE PROMOTION?   BROKER / OTHER NOTES

Plan Dates

YEAR	PERIOD START	SHIP DATE START	ORDER DATE START	PERFORMANCE START
2,022	May	05/01/2022	05/01/2022	05/01/2022
	WEEKS PERFORMANCE	SHIP DATE END 05/31/2022	ORDER DATE END 05/31/2022	PERFORMANCE END 05/31/2022

Discounts and Lump sum (Enter either % discount -OR- rate per unit)

ITEM	ITEM DISPLAY NAME	ITEM PRICE	% DISCOUNT	% REDEMPTION
ACC00008 Product A size 8	Product A size 8	95.95	10.0%	100.0%
UNIT OF MEASURE Each(1)	LUMP SUM 0.00	METHOD OF PAYMENT Bill-Back	RATE 0.00	☐ MORE DISCOUNTS? ☐ ALL ITEMS GET DISCOUNT?

Estimated Quantity (Enter any two: Base & % lift, -OR- Revenue and % lift, -OR- base and incremental)

BASE	INCREMENTAL	% LIFT	REVENUE	
0	0	0.0%	0.00	☐ UPDATE BASE WITH FORECAST

KPIs and Calculated Measures

CALCULATED BASE	TOTAL EVENT UNITS	TOTAL EVENT REVENUE	INC EVENT REVENUE	PLAN TOTAL SPEND 0.00

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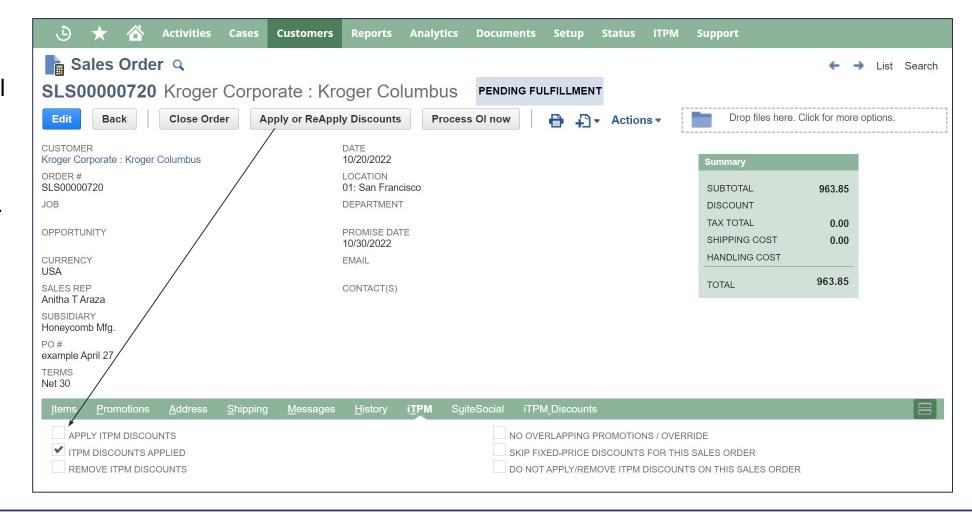19. S-03743: New allowance list view: **iTPM -> Promotions -> Allowances by item**

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17. New button on the sales order: **"*Apply or ReApply Discounts"***

Benefits: Save time and mouse clicks to check the "*Apply iTPM Discounts*" checkbox on sales orders.

If there are discounts to apply, your sales order will go into the queue to be processed and you'll see the "Please wait…" banner on the sales order.
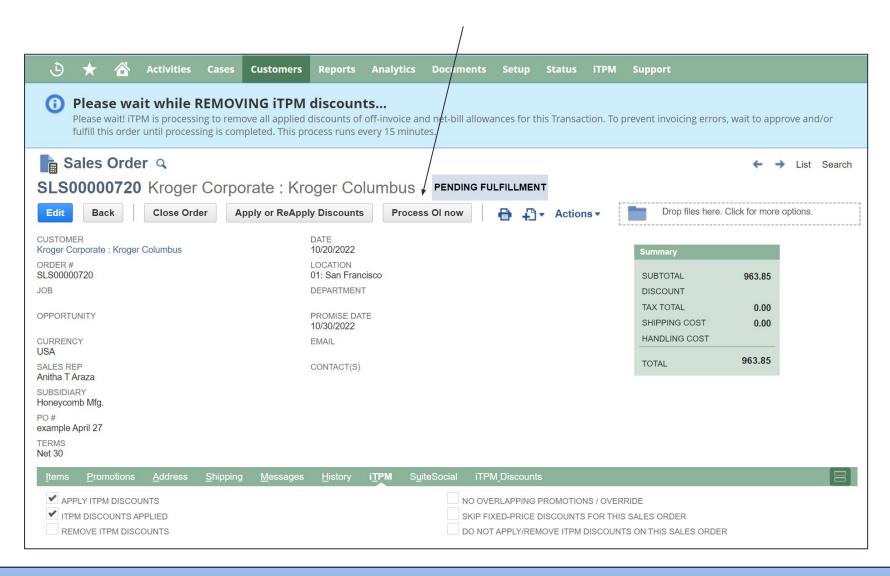
If there are no discounts to apply, in real-time you'll get a pop-up confirmation and your sales order is ready for approval and/or fulfillment.

18. New button on the sales order: "*Apply OI Now*" so you don't have to wait
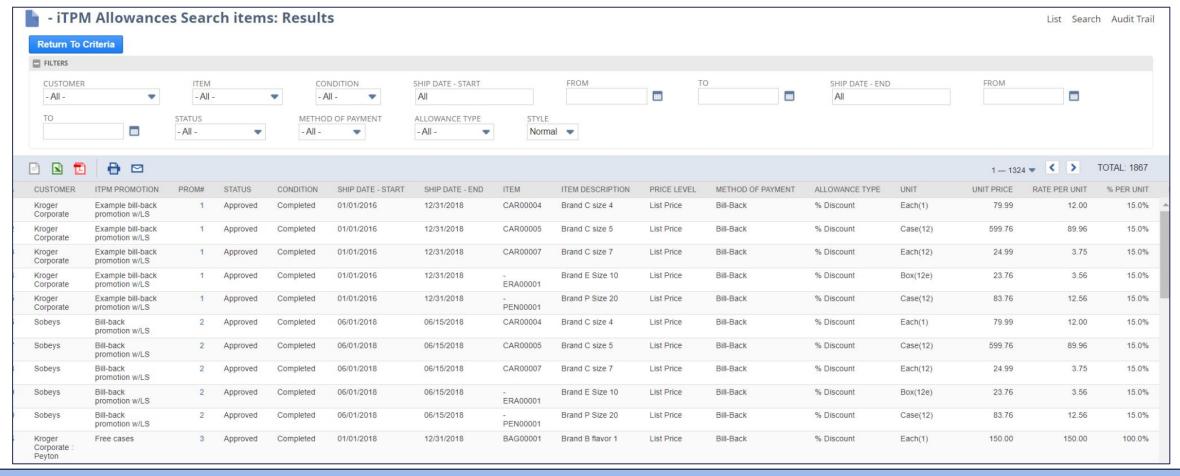
Benefits: Less time waiting the 15 minutes in between when the off-invoice script runs.

If you don't see the "*Process OI now*" button, then the script is already running.

19. New allowance list view: *iTPM -> Promotions -> Allowances by item*

Benefits: For promotions planned using item groups, see your discounts by item across promotions. Same information as under the ALLOWANCES subtab in the promotion.

Update Schedule

The next update is tentatively scheduled for Summer **2023.**

i-TPM Anticipated Releases	Anticipated Date Generally Available*
'Minor' Updates 23.1.x	As needed. Release date and enhancements may change based on client needs and requests.
'Major' Release **23.2**.1	Summer 2023. Release date and enhancements may change based on client needs and requests.

* Subject to change

Summary

- Email questions and issues to support@cgsquared.com

- Updated User Guides for all roles are available online at

    www.i-TPM.com/training-resources